

## PM Admin Training

### Annual Performance Planning Exercise Instructions

#### Evaluator Review:

1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyPerformance (Actions/Request).



3. Locate the employee that has been assigned to you then select **Launch**.



4. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.
5. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. You will notice for each competency you have the option to include comments for further explanation.

*For example, under Professional Development you may add a comment that says, “Employee is expected to complete 06 hours of training per year”.*

6. After you have reviewed all competencies and added any necessary comments, select **Save and Continue**.

7. **Goal Planning Section**- Review the instructions for the evaluator.

- a. On the right hand side of your screen, select **Add Goals** to add 3-5 goals.

- b. You can manually enter the goals by entering a goal into the title field. The description field is available to further define the goal, this is not required. OR see below on how to utilize the goals library.

- c. For your convenience, we have created a goals library with a list of possible goals for all job titles. To utilize this feature, select **Library** located on the right hand side of your screen.

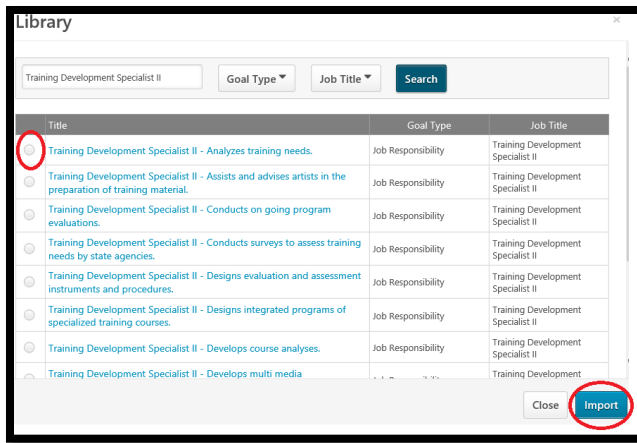
-Enter the employee's job title and select **Search**.

- Select the radio button next to a goal you wish to add, select **Import**.

\*Only one goal can be imported at a time.

\*Ensure you are selecting goals with a title that corresponds with the employee's job title.

\*Other duties as assigned is not a goal, this can be used as a task within a goal.



- Once imported, you may choose to remove the position title from the goal title.

-You may also update or add to the imported goal title and/or description.

d. Verify each goal has a start and end date that matches the review period. For example, 01/01/2020 12/31/2020

e. **Weight each goal.** The system will accept any percentage you enter, all goals should equal 100%.

f. If you used the goals library, the goal type will default to Job Responsibility. If you entered the goal manually, use the drop down and select Job Responsibility.

Start Date: 1/1/2020  
End Date: 12/31/2020  
Weight: 20  
Goal Type: Job Responsibility  
Job Title: Training Development Spe...

g. Each goal must have at least one task, you can add multiple tasks to a goal if applicable. Select **Add Tasks** and enter the task description, this should follow the SMART criteria and further define your goal.

\*SMART: Specific, Measurable, Achievable, Realistic, Timely

h. Verify that your task start and end dates match the review period and then select **Done**.

For example, 01/01/2020 – 12/31/2020

Description: Conducts quarterly review on all agency training material and makes recommendations for revisions to leadership.

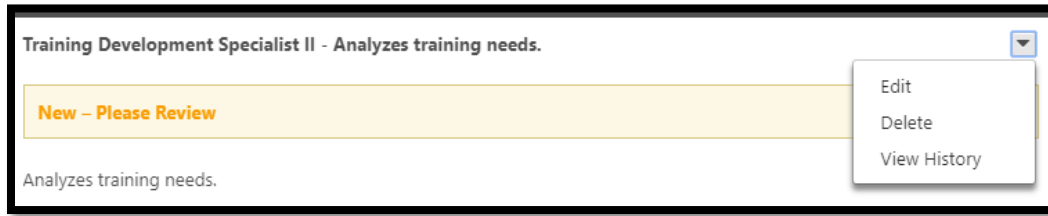
Start Date: 1/1/2020  
End Date: 12/31/2020

Buttons: Cancel, Done

i. From the Create goals page, review your goals and tasks and select **Save**.

\*Repeat steps a-i until all goals and tasks have been added

- j. From the goals page, you will see a yellow banner identifying all new goals. If you need to edit or delete a goal, use the drop down to view options for each goal.



8. **Do not** select the Submit button when finished.